CALIFORNIA
STUDENT AID
COMMISSION

TOOLS

WebGrants User Guide

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Tools Main Page

Purpose

Various tools are being developed that function outside of WebGrants and assist schools in utilizing WebGrants data more efficiently. Most of these tools will require that users download programs onto their own computers. Some require additional software be resident on the user's computer.

Page Elements

1. Tools Menu
This link is at the top every page and will open the Tools Menu from any screen.

2. Roster Data File Compare
UC Davis developed an executable program to compare roster data files; Commission staff then modified the program so that it could be launched without the need for schools to purchase additional software. Use of this tool allows a data file comparison to be run on the user's computer rather than through the Internet using WebGrants. This allows a faster comparison time and allows comparisons when WebGrants access is not available.

3. Excel Grant Roster Template
Available for both Excel 97 and Excel 2000, this template will open a saved Roster Data File in Excel and label all of the column headings. Knowledge of Excel is required to use this tool.

Figure 1-1: Tools Page

4. Excel EL Verification Template
Allows user to open a downloaded EL Verification Datafile (available through the Report Download screen on WebGrants) and view the file in Excel. Users can then modify the Education Level of any student on the datafile, and convert the document back to a text file for upload to the Commission through the WebGrant File Upload page.

5. Excel Unclaimed Award Template
Allows user to open a downloaded Unclaimed Award Datafile (available through the Report Download screen on WebGrants) and view the file in Excel. Knowledge of Excel is required to use this tool.

6. Excel GPA Template
GPA reject reports can be opened into a Microsoft Excel spreadsheet allowing the user to correct the errors and save the file to be uploaded into WebGrants. This template will also allow a user to enter GPAs directly into an Excel spreadsheet and then convert them into the correct format for upload into WebGrants.

7. Adobe Acrobat
Various documents stored in WebGrants are published in Adobe Acrobat Portable Document Format (.pdf). If your system does not have Adobe software that can read .pdf files, you can download the free Adobe reader here.
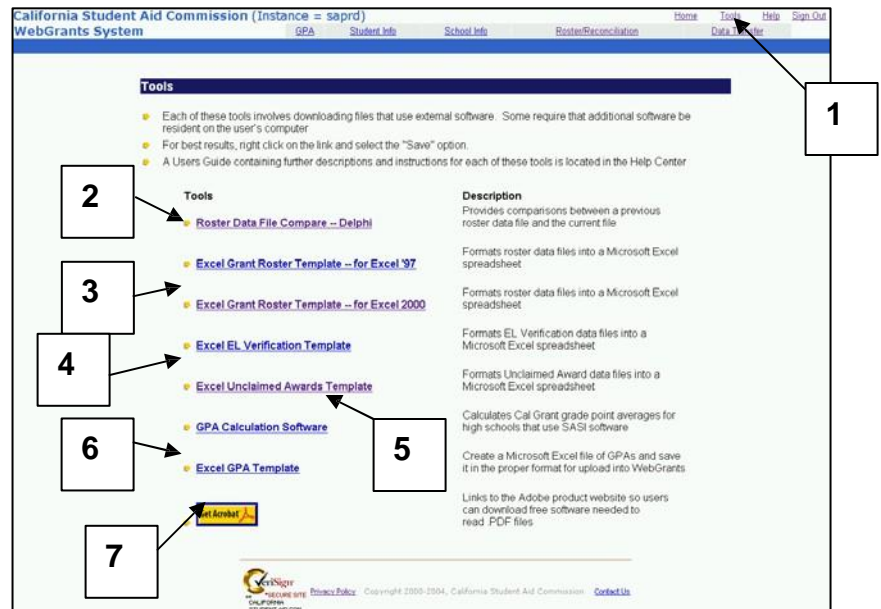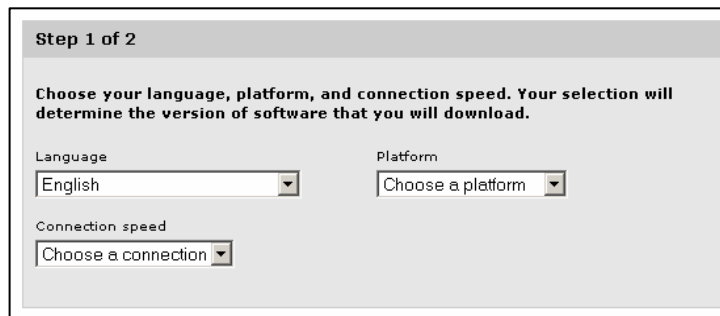
Access

The Tools menu can be accessed from any screen.

Page Functions

Figure 2-1: Save As

Download Roster Data File Compare Tool
1. Right click the Roster Data File Compare link
2. Select <Save Target As> (see figure 2-1)
3. Select a location to save the program file. Saving the file to the user's desktop is the recommended location.
4. A Download Complete box will appear; click the <Open> button to begin.

Download Excel Grant Roster Template
1. Right click the Excel Grant Roster Template link that corresponds to the version of Excel being used
2. Select <Save Target As> (see figure 2-1)
3. Select a location to save the program file. Saving the file to the user's desktop is the recommended location.
4. A Download Complete box will appear; click the <Open> button to launch the program (see figure 2-2).
5. The Excel program will launch and a message regarding enabling macros will appear. Select <Enable Macros> to continue (see figure 2-3).

Figure 2-2: Download Complete

Figure 2-3: Enable Macros

Download Excel GPA Template
1. Right click the Excel GPA Template link
2. Select <Save Target As> (see figure 2-1)
3. Select a location to save the program file. Saving the file to the user's desktop is the recommended location.
4. A Download Complete box will appear; click the <Open> button to launch the program (see figure 2-2).
5. The Excel program will launch and a message regarding enabling macros will appear. Select <Enable Macros> to continue (see figure 2-3).
6. When the file opens, use the <Save As> function located in the File menu to rename the file. This will prevent saving over the actual template (see figure 2-4).

Figure 2-4: File – Save As

Tools Main Page

Download Adobe Acrobat Software

1. Review the system requirements before downloading Adobe Reader 6.0. Choose your language, platform and connection speed. (see figure 3-1).
   ™ Platforms available include most recent versions of Windows and Mac as well as Pocket PC, Palm and Linux.
2. Choose a connection speed that best matches your system's internet connection speed.
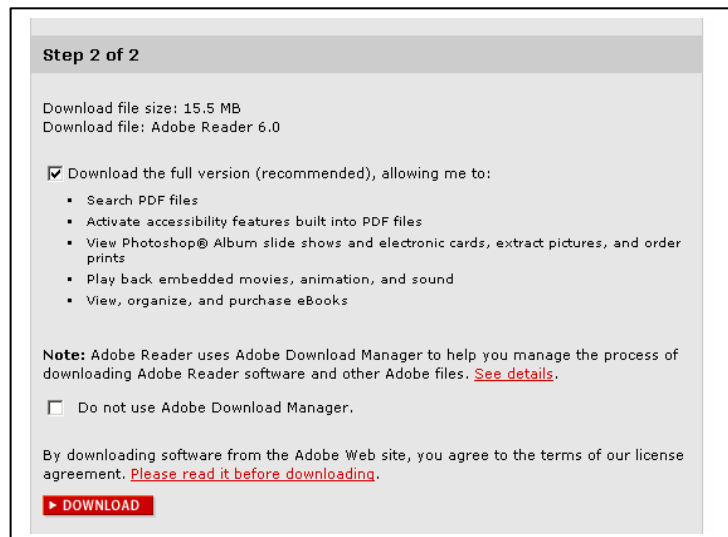3. Click the <Download> button to download the software to your computer. (see figure 3-2)

Figure 3-1: Adobe Download Step 1

Figure 3-2: Adobe Download Step 2

Purpose

The Roster Data File Compare Tool allows schools to compare CSAC payment roster data files to isolate changes and new data. To use the tool, the files to be compared must reside on the user's hard drive, a floppy drive or on any user accessible network drive.

Page Elements

1. Select Old File Button
This is used to select the old "base" file to which the new file will be compared. The old file must have been previously saved to the user's own hard drive, a floppy drive or on any user accessible network drive.

2. Select New File Button
This is used to select the new file to be compared to the old file. The new file must be saved on the user's hard drive, a floppy drive or on any user accessible network drive.

3. Compare Button
This is used to perform the comparison between the selected old and new data files.

Figure 4-1: Roster Date File Compare Tool

4. Display choices panel
Once the data comparison has been completed, the user can select which changes to view in the Display Comparison Data Field
- Results File - The results file is in the same format as the roster file format, used prior to July 2003, displaying changed records with an @ sign and new records with an *. All of the records on the New File are included in this data file.
- Dropped Records – These are those records that were appearing on the Old File but not on the New File.
- Changed Records – These are the records that had changes to the Roster Indicator (Section), Unmet Need, Forecasted AY Eligibility or Annual Award Amount from the Old File to the New File.
- First Time on Roster – Displays only those records that were not on the Old File but are on the New File.

5. Display Comparison Data Field
Field used to display compared data.

6. Save New Data File Button
This button is used to save the resulting comparison data file to their hard drive or other user selected location.

7. Print Button
Use this button to print the resulting data file. The "Results File" view will be very large and the user would probably only print the "Changed," Dropped" or "First Time on Roster" views.
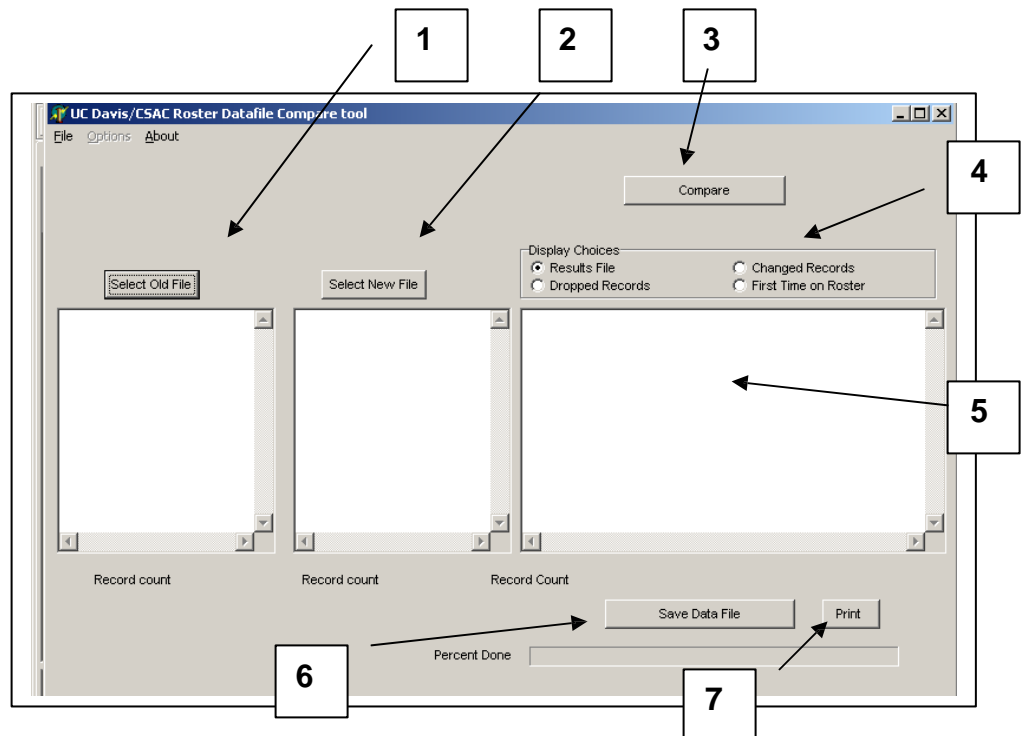
Roster Data File Compare Tool

Access

The Roster Data File Compare Tool can be accessed by clicking the Tools menu from any screen. Select the link for the tool. The program can be run in place or saved on the user's computer.

Page Functions

Compare Two Roster Data Files Adding Indicators For New and Changed Records

1. Save both of the files to be compared using the Data Transfer/Report Download function.
2. Click on the <Select Old File> button and choose the old roster file to which you will compare the new file.
3. Using the <Select New File> button, choose the new roster file that you will compare to the old file.
4. Hit the <Compare> Button.
5. Upon completion click on the <Results File> indicator.

   ™ The resulting data file will contain all of the records contained in the **New File**. Changed records are indicated with a @ sign and new records with an * (see figure 5-1).
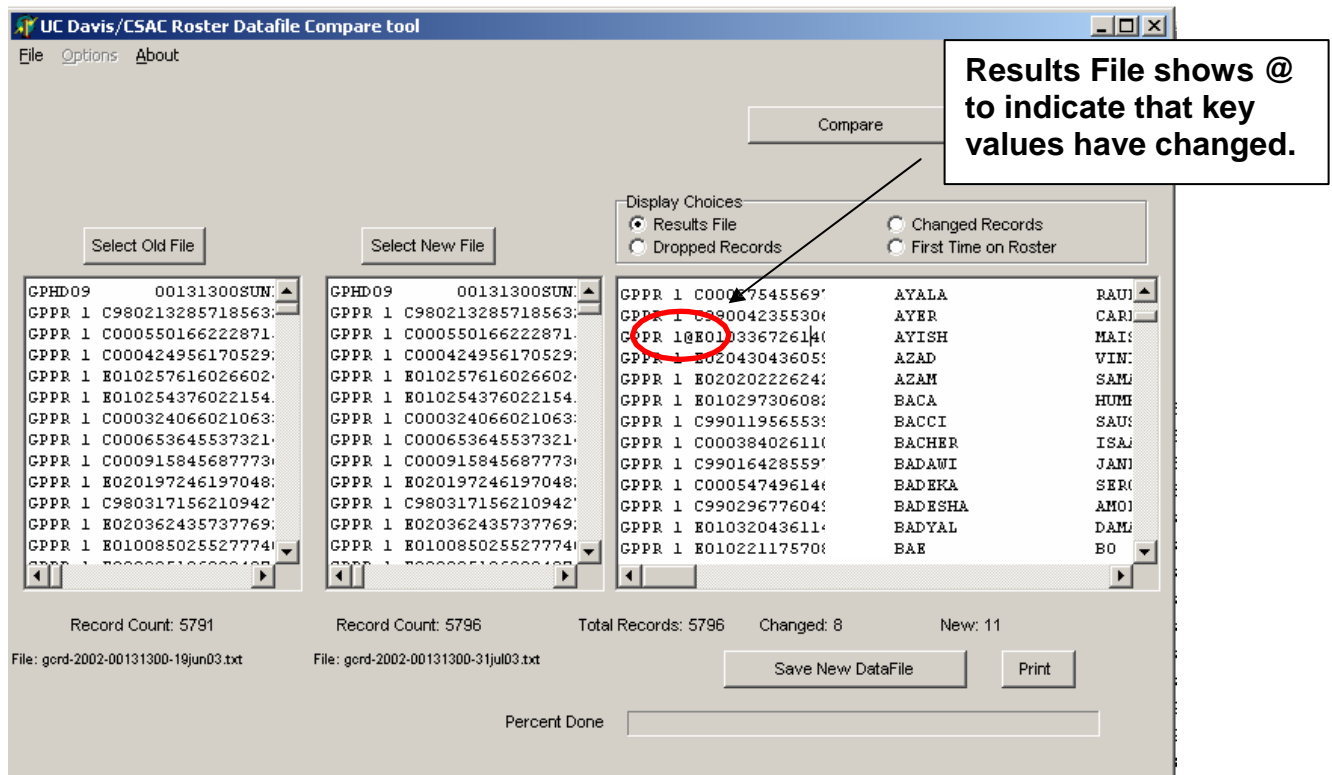
Figure 5-1: Roster Date File after Compare is run

Roster Data File Compare Tool

Compare Two Roster Data Files And Display Grant Records That Are No Longer On The Roster

1. Save both of the files to be compared using the Data Transfer/Report Download function.
2. Click on the <Select Old File> button and choose the old roster file to which you will compare the new file.
3. Using the <Select New File> button, choose the new roster file that you will compare to the old file.
4. Hit the <Compare> Button.
5. Upon completion click on the <Dropped Records> indicator.

   ™ The resulting data file will include a list of all students formerly on the user's roster that have been transferred to another school's roster since the **Old File** selected in step 2 was originally created by the Commission.

Compare Two Roster Data Files And Display Only Grant Records That Have Been Changed

1. Save both of the files to be compared using the Data Transfer/Report Download function
2. Click on the <Select Old File> button and choose the old roster file to which you will compare to the new file.
3. Using the <Select New File> button, choose the new roster file that you will compare the old file.
4. Hit the <Compare> Button.
5. Upon completion click on the <Changed Records> indicator.

   ™ The resulting report will list <u>only</u> those records where the payment data has been changed from the **Old File** selected in step 2. The report is formatted to list the type of change first, the records changed, and both the old and new data values.

Compare Two Roster Data Files And Display Only Grant Records That Are New

1. Save both of the files to be compared using the Data Transfer/Report Download function
2. Click on the <Select Old File> button and choose the old roster file to which you will compare to the new file.
3. Using the <Select New File> button, choose the new roster file that you will compare the old file.
4. Hit the <Compare> Button..
5. Upon completion click on the <First Time on Roster> indicator.

   ™ The resulting data file will <u>only</u> show those records that are in the **New File** but did not appear on the **Old File**.

Roster Data File Compare Tool

Save the Resulting File

1. After Roster Date File Compare is run as in Figure 5-1

2. Click <Save New Data File> button

3. Chose name of resulting file and location to save file (see figure 7-1).
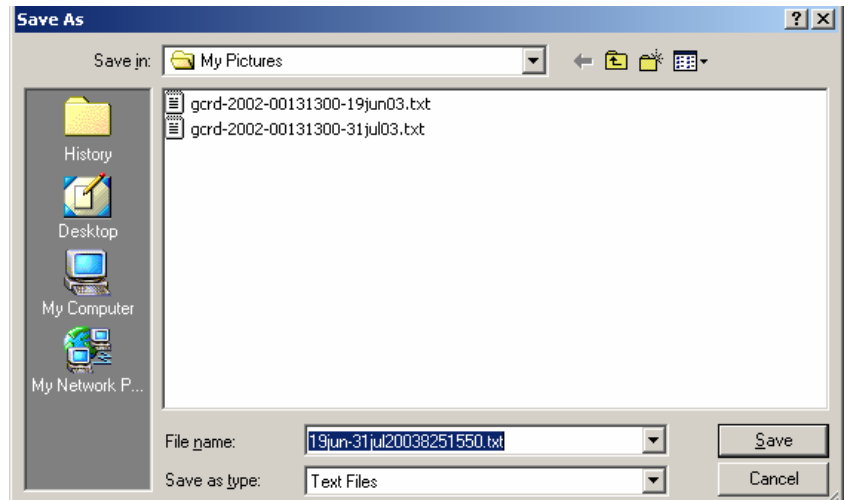
4. Hit <Save> Button in "Save As" popup window.

Figure 7-1: "Save As" pop-up box

Excel Grant Roster Template

Purpose

The Excel Grant Roster Template allows schools to download Grant Roster data files from WebGrants and open them into a Microsoft Excel worksheet without having to go through the steps to parse the data. Schools must have the Microsoft Excel program installed to be able to use this tool.

Page Elements

Figure 8-1: Excel Grant Roster Template

1. Get Files Button
This tab identifies the function being performed. At a later date a Send Files tab will be added that will allow a user to upload a file to the Commission.

2. General Version
This is used to select the format for the data file. The General Version contains no special formatting of the data. For example, a Social Security number would be displayed as 999999999. Once selected, the user will be prompted to select a data file to open.

3. Printer Version

This is used to select the format for the data file. The Printer version adds some formatting to specific data elements, such as dates and currency. For example a Social Security number would be displayed as 999-99-9999. Once selected, the user will be prompted to select a data file to open.

4. Help Button
There is some basic help text incorporated into this tool. It can be viewed to obtain an additional overview of the tool's features (see figure 8-2).

5. Exit Button
This button allows a user to exit the program. The Excel spreadsheet will remain open on the user's desktop.

6. Cancel Button
This button is used to cancel a request to open a new data file.

Figure 8-2: Data Tools Help

Access

The Excel Grant Roster can be access by clicking the Tools menu from any WebGrants screen. Select the link for the tool. The program should be saved on the user's computer. Once it is saved, it can be opened from the Tools menu on Excel (see figure 8-3).

Excel 2003 Users: please make sure that your macro security settings are set to "medium." To do this go to Tools, select Macro and in the Security Level tab, "medium" should be checked.
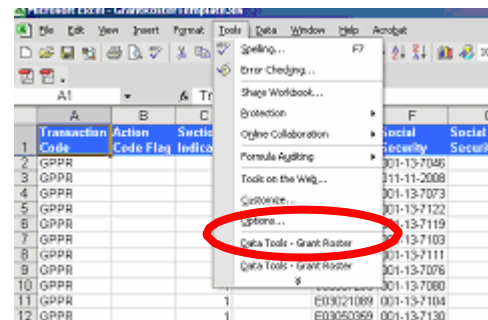

Figure 8-3: Open from Excel

Excel Grant Roster Template

Page Functions

Open Roster Data File Using Microsoft Excel – General Version

1. Save the file to be viewed using the WebGrants Data Transfer/Report Download function.
2. Click on the <GR> button under General Version
3. Locate the file to be viewed and click <open> (see figure 9-1).
4. When the process is complete, a message will appear on the screen (see figure 9-2)
5. Click <OK> to continue

   ™ The Get Files box will remain on the screen. Click <Exit> to close the box. The Excel file will remain open. To save a file, use the Save As function in Excel to avoid changing the template.

Figure 9-1: Select a Grant Roster Date File to Import

Figure 9-2: Get File Process Complete

Excel Grant Roster Template

Open Roster Data File Using Microsoft Excel – Printer Version

1. Save the file to be viewed using the WebGrants Data Transfer/Report Download function.
2. Click on the <GR> button under Printer Version
3. Locate the file to be viewed and click <open> (see figure 9-1).
4. When the process is complete, a message will appear on the screen (see figure 9-2)
5. Click <OK> to continue

   ™ The Get Files box will remain on the screen. Click <Exit> to close the box. The Excel file will remain open (see figure 10-1).

Figure 10-1: Sample Excel file – Printer Version

Excel Grant Roster Template

Save the Resulting File

1. After the file has opened, it is best to save the file under a new name

2. Click <File> the <Save As> from the Excel menu (see figure 11-1)

3. Chose name of resulting file and location to save file.
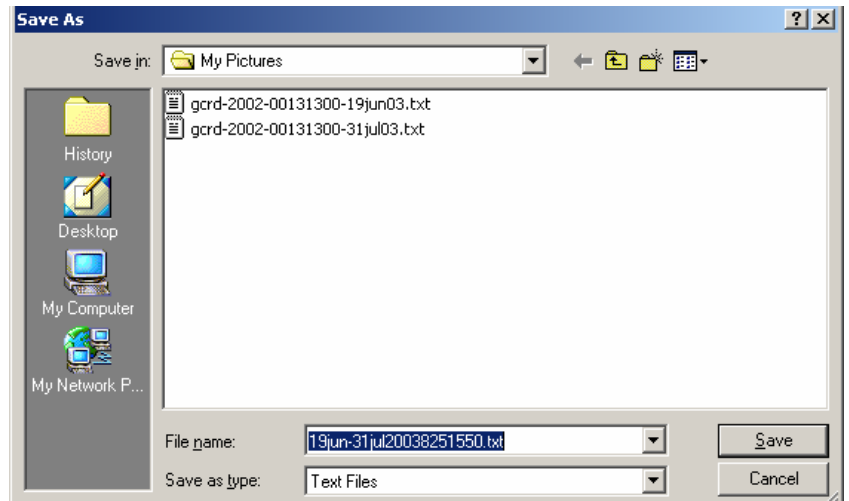
4. Hit <Save> Button in "Save As" popup window.

Figure 11-1: "Save As" pop-up box

Using Microsoft Excel

Once the file is opened and saved, users can sort and filter roster data any way they choose. A basic knowledge of Microsoft Excel is required to use this tool.

Excel GPA Template

Purpose

The Excel GPA Template allows schools to download GPA rejected record files from WebGrants and open them into a Microsoft Excel worksheet to correct the data. Schools may also key GPAs into a blank worksheet and then save the file in the correct format for upload through WebGrants. Schools must have the Microsoft Excel program installed to be able to use this tool.

Page Elements

Figure 12-1: Main Menu

1. Get Files Tab
This tab will allow a user to locate and open a text file of GPAs, for example a rejected records file downloaded from WebGrants.

2. Save As Text File Tab
This tab will allow a User to save an Excel file into a text format for upload into WebGrants.

3. Option area
This area contains the function buttons that allow a user to locate the file to be processed.

4. Help Button
There is some basic help text incorporated into this tool. It can be viewed to obtain an additional overview of the tool's features (see figure 12-2).

5. Exit Button
This button allows a user to exit the program. The Excel spreadsheet will remain open on the user's desktop.

6. Cancel Button
This button is used to cancel a request to open a new data file.

Figure 12-2: Data Tools Help

Access

The Excel GPA Tool can be access by clicking the Tools menu from any WebGrants screen. Select the link for the tool. The program should be saved on the user's computer. Once it is saved, the program can be opened from the Tools menu on Excel (see figure 12-3).

Excel 2003 Users: please make sure that your macro security settings are set to "medium." To do this go to Tools, select Macro and in the Security Level tab, "medium" should be checked.

Figure 8-3: Open from Excel

Figure 12-3: Excel Tools Menu

Excel GPA Template

Page Functions

Open GPA Data File Using Microsoft Excel (Display/Download Rejected Records)

Before opening the Excel tool, save the file to be viewed from the WebGrants GPA File Upload Status screen using the <Display/Download Rejected Records> link.

1. Click on the <GPA text file> button under Get Files
2. Locate the file to be viewed and click <open>
3. When the process is complete, a message will appear on the screen (see figure 13-1)
4. Click <OK> to continue. The resulting spreadsheet will look like figure 13-2.

    ™ The Get Files box will remain on the screen. Click <Exit> to close the box. The Excel file will remain open. To save a file, use the Save As function in Excel to avoid changing the template.
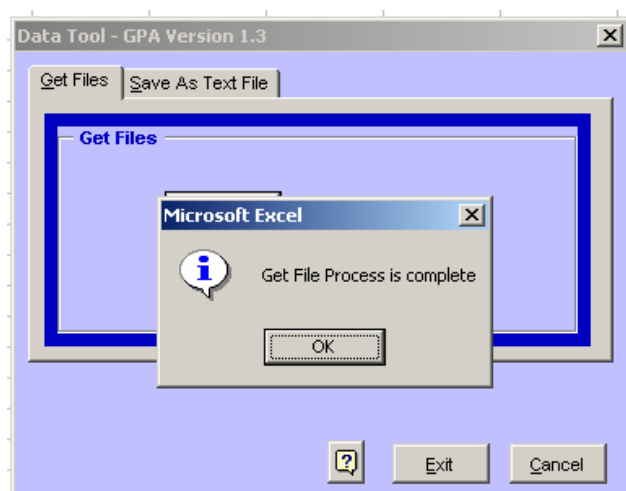
Figure 13-1: Get File Process Complete

Figure 13-2: Resulting File Layout

Excel GPA Template

Create GPA File Using Microsoft Excel

1. Open the Tool in Excel and click the <Exit> button to close the menu box
2. Use the Save As function and create a meaningful file name.
3. Begin entering data following the guidelines for GPA entry.

   ™ The red triangles at the top of each column provide brief descriptions of the required data for that field (see figure 14-1).

Figure 14-1: Column Headings

Save GPA File for Upload to WebGrants

1. Open the Data Tool in Excel by clicking on the Excel Tools menu (see figure12-3)
2. Select the Save As Text File tab (see figure 14-2).
3. Click on the drop arrow and select the sheet that contains the data (see figure 14-2)
4. Click on the <Save> button
5. A Browse for Folder box will appear (see figure 14-3). Select the location to store the file. Make a note of the file name so it will be easy to locate when uploading to WebGrants

   ™ To upload the file to WebGrants, follow the instructions in the GPA User Guide.
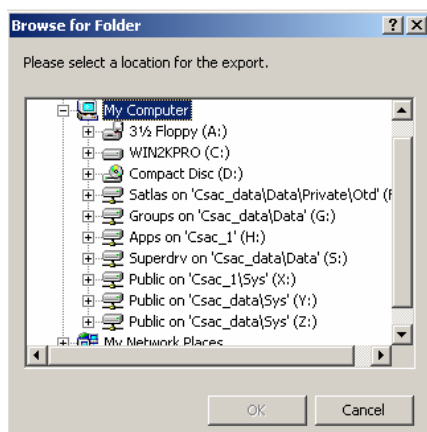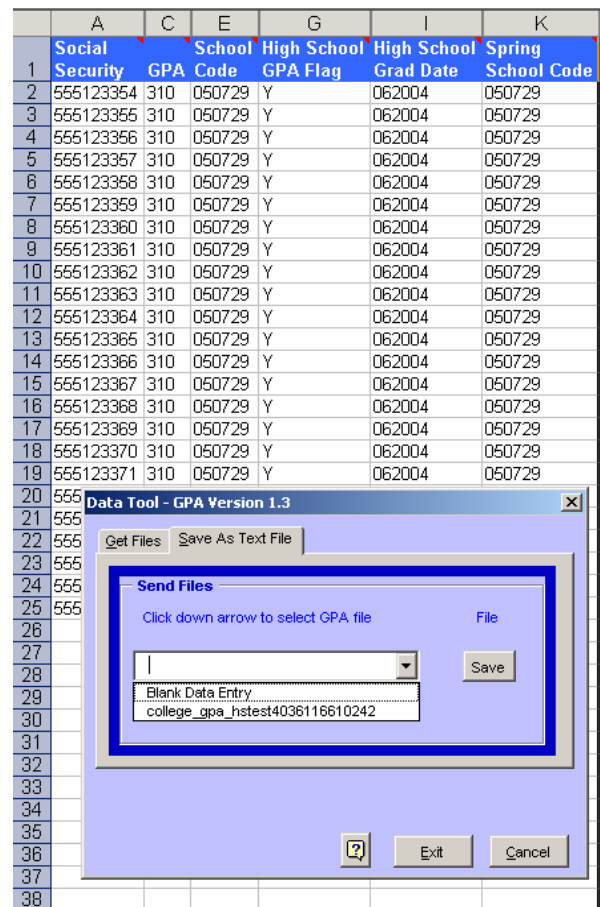

Figure 14-3: Browse for Folder

Figure 14-2: Save As Text File

EL Verification Template

Purpose

The EL Verification Template allows schools to download EL Verification data files from WebGrants and open them into a Microsoft Excel worksheet without having to go through the steps to parse the data. Schools must have the Microsoft Excel program installed to be able to use this tool.

Page Elements

1. Get Files Tab
This tab will allow a user to locate and open a downloaded EL Verification data file.

2. Save as Text File Tab
This tab will allow a user to save an Excel file into a text format for upload into WebGrants.

3. EL Text File Button
This is used to select the data file. Once selected, the user will be prompted to select a data file to open.

Figure 15-1: Data Tools Help

4. Help Button
There is some basic help text incorporated into this tool.
It can be viewed to obtain an additional overview of the tool's features.

5. Exit Button
This button allows a user to exit the program. The Excel spreadsheet will remain open on the user's desktop.

6. Cancel Button
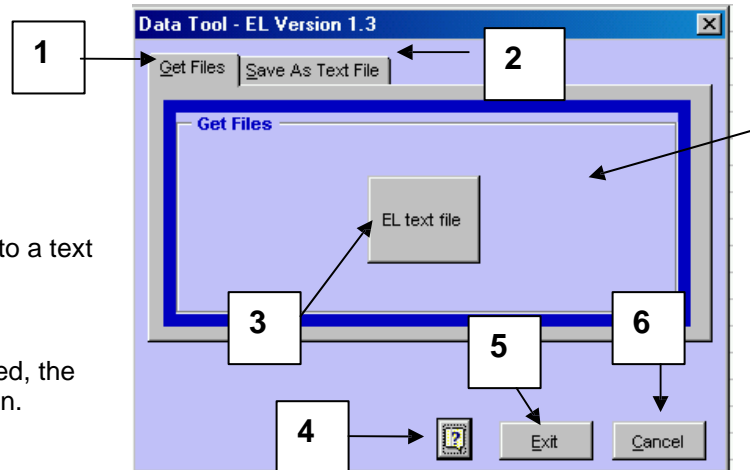This button is used to cancel a request to open a new data file.

Access

The EL Verification Template can be accessed by clicking the Tools menu from any WebGrants screen. Select the link for the tool. The program should be saved on the user's computer. Once it is saved, it can be opened from the Tools menu on Excel (see figure 15-2).

Excel 2003 Users: please make sure that your macro security settings are set to "medium." To do this go to Tools, select Macro and in the Security Level tab, "medium" should be checked.
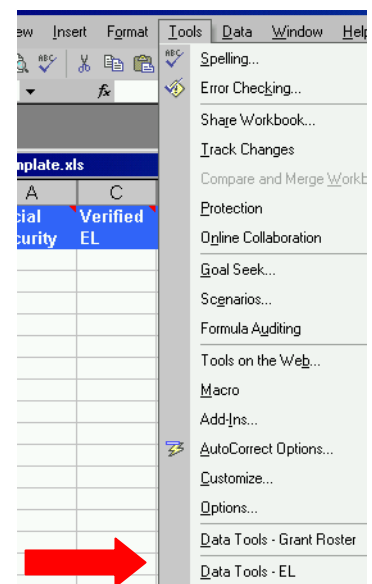

Figure 15-2: Open from Excel

Page Functions

Open EL Verification Data File Using Microsoft Excel

1. Save the file to be viewed using the WebGrants Data Transfer/Report Download function.
2. Click on the <EL Text File> button under the Get Files Tab.
3. Locate the file to be viewed and click <open> (see figure 16-1).
4. When the process is complete, a message will appear on the screen (see figure 16-2).
5. Click <OK> to continue

   ™ The Get Files box will remain on the screen. Click <Exit> to close the box. The Excel file will remain open. To save a file, use the Save As function in Excel to avoid changing the template.
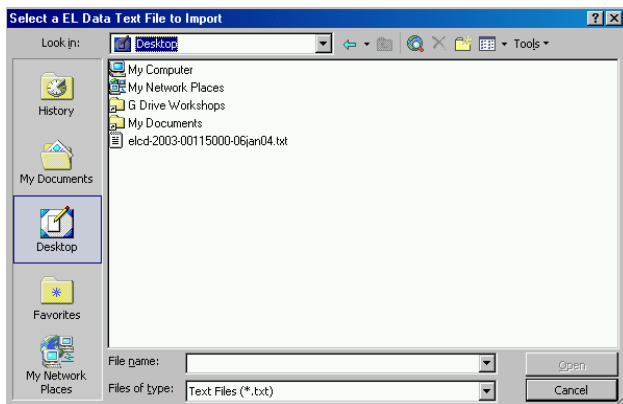
Figure 16-1: Select an EL Verification Date File to Import
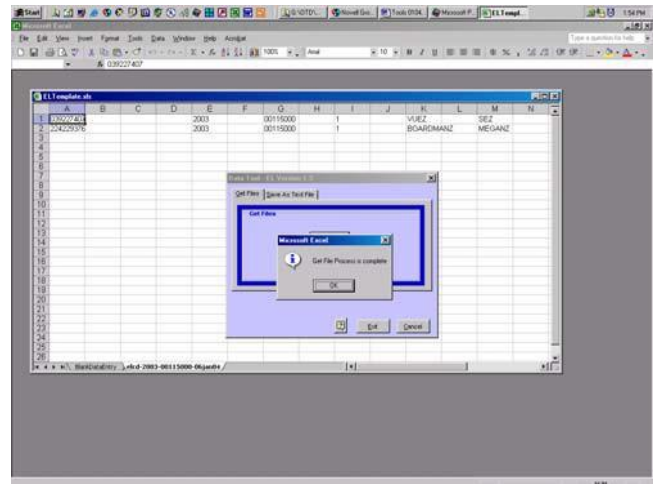
Figure 16-2: Get File Process Complete

Save the Resulting File

1. After the file has opened, it is best to save the file under a new name
2. Click <File> the <Save As> from the Excel menu (see figure 11-1)
3. Choose name of resulting file and location to save file.
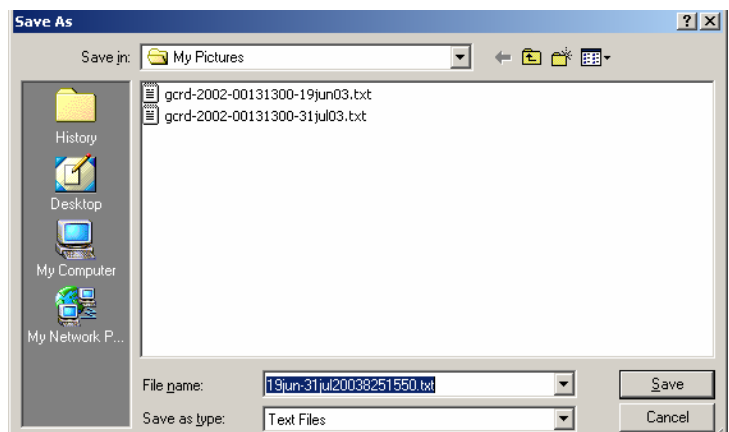4. Hit <Save> Button in "Save As" popup window.

Figure 16-3: "Save As" pop-up box

Using Microsoft Excel

Once the file is opened and saved, users can sort and filter EL Verification data any way they choose. A basic knowledge of Microsoft Excel is required to use this tool.

EL Verification Template

Update EL Verification Data File

1. Open the EL Verification Data file to modify using the instruction on page 16.
2. Update the Verified EL field for each student listed in the data file using the following key:
    1= Freshman
    2 = Sophomore
    3 = Junior
    4 = Senior
    6 = Has B.A. degree
    9 = Unable to determine Education Level
3. Save the file using the instructions on page 16.

Convert Modified EL Verification Data File to a Text File for Upload to WebGrants

1. Open the EL Verification Tool in Excel by clicking on Data Tools – EL found under the Tools menu (see figure15-2)
2. Open the EL Verification data file to convert using the instructions on page 16.
3. Select the Save As Text File tab (see figure 17-1).
4. Click on the drop arrow and select the sheet that contains the data (see figure 17-1).
5. Click on the <Save> button

6. A Browse for Folder box will appear (see figure 17-2). Select the location to store the file. Make a note of the file name so it will be easy to locate when uploading to WebGrants
    ™ To upload the file to WebGrants, follow the instructions in the WebGrants Data Transfer User Guide.
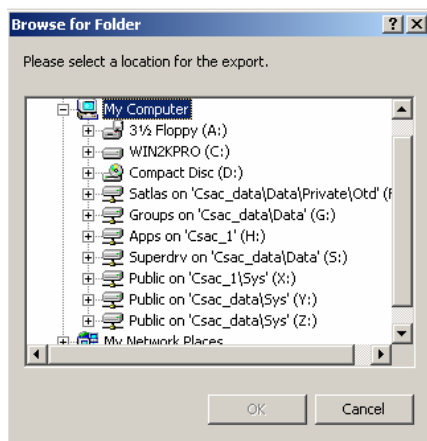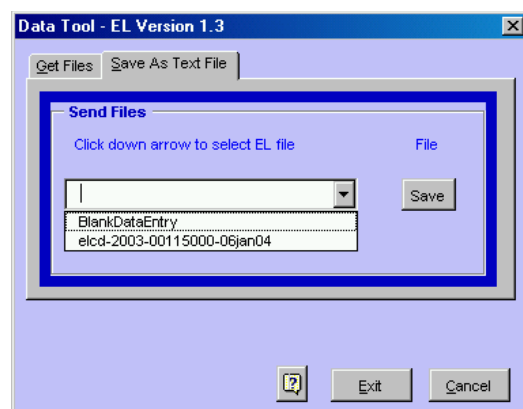

Figure 17-2: Browse for Folder

Figure 17-1: Save as Text File Tab

Unclaimed Award Template

Purpose

The unclaimed award report is a list of Cal Grant recipients who have had no payments reported during the selected academic year at any of the six participating California school choices indicated on the student's ISIR. This report will be generated periodically throughout the year beginning with the October month-end cycle of the award year and through final reconciliation for that year. Each time the report is created it will overwrite the previous report. The Unclaimed Award Template allows schools to download an Unclaimed Award data files from WebGrants and open them in a Microsoft Excel worksheet without having to go through the steps to parse the data. Schools must have the Microsoft Excel program installed to be able to use this tool.

Page Elements

1. Get Files Tab
This tab will allow a user to locate and open a downloaded unclaimed award file.

3. Unclaimed Awards File Buttons
The "General Version" button is used to import a downloaded unclaimed award report in a data file format into an Excel spreadsheet. The "Printer Version" button is used to import a downloaded unclaimed award report in a report format into an Excel spreadsheet.
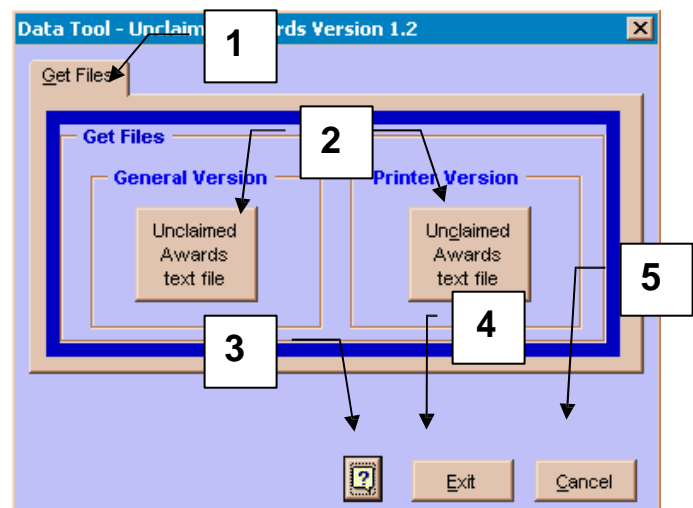
4. Help Button
There is some basic help text incorporated into this tool. It can be viewed to obtain an additional overview of the tool's features.

5. Exit Button
This button allows a user to exit the program. The Excel spreadsheet will remain open on the user's desktop.

6. Cancel Button
This button is used to cancel a request to open a new data file.

Access

The Unclaimed Award Template can be accessed by clicking the Tools menu from any WebGrants screen. Select the link for the tool. The program should be saved on the user's computer. Once it is saved, it can be opened from the Tools menu in Excel (see figure 18-2).

Excel 2003 Users: please make sure that your macro security settings are set to "medium." To do this go to Tools, select Macro and in the Security Level tab, "medium" should be checked.
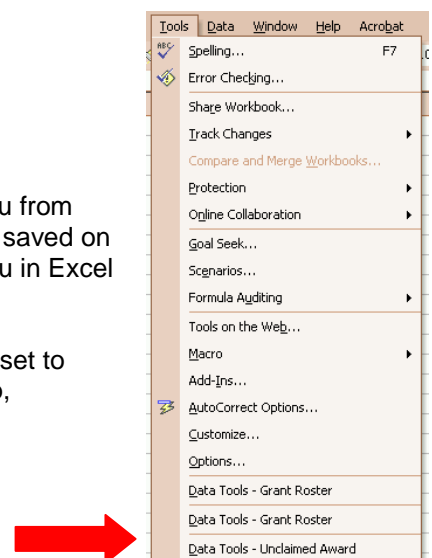
Figure 18-2: Open from Excel

Page Functions

Open Unclaimed Award Data File or Report Using Microsoft Excel

1. Save the file to be viewed using the WebGrants Data Transfer/Report Download function.
2. Click on the <Unclaimed Awards text file> button under the Get Files Tab.

   ™ If the file you are importing to Excel is a formatted as a data file, click the button under "General Version." If the file you are importing to Excel is a formatted as a report file, click the button under "Printer Version." See page 4 of the Data Transfer WebGrants User Guide for a description of the "media type" of a downloaded file.
3. Locate the file to be viewed and click <open> (see figure 19-1).
4. When the process is complete, a message will appear on the screen (see figure 19-2).
5. Click <OK> to continue

   ™ The Get Files box will remain on the screen. Click <Exit> to close the box. The Excel file will remain open. To save a file, use the Save As function in Excel to avoid changing the template.
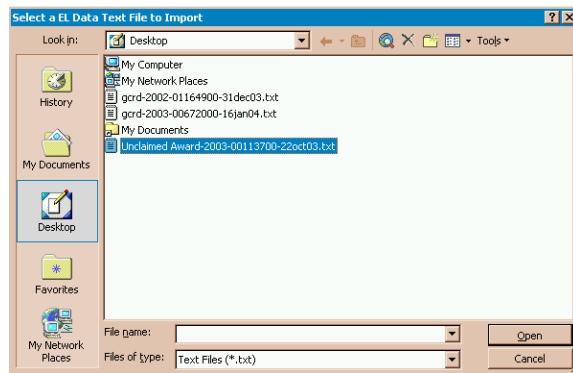
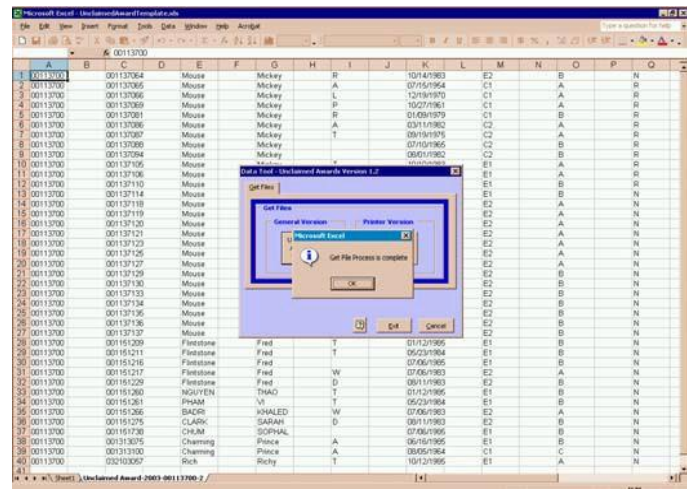*Figure 19-1: Select an EL Verification Date File to Import*

Figure 19-2: Get File Process Complete

Save the Resulting File

1. After the file has opened, it is best to save the file under a new name
2. Click <File> the <Save As> from the Excel menu (see figure 11-1)
3. Choose name of resulting file and location to save file.
4. Hit <Save> Button in "Save As" popup window.

Using Microsoft Excel

Once the file is opened and saved, users can sort and filter EL Verification data any way they choose. A basic knowledge of Microsoft Excel is required to use this tool.

CA ISIR Tool

Purpose

This tool is used to open and view Cal ISIRs in a friendly format. Each year's tool is designed to work with the CA ISIR file format of that year.

Please note that tool instructions are included on the worksheet tabs. This can be used with Excel 2007 and 2010.

Page Elements

1. **Open the CA ISIR File Import.xlsm Excel workbook file**.
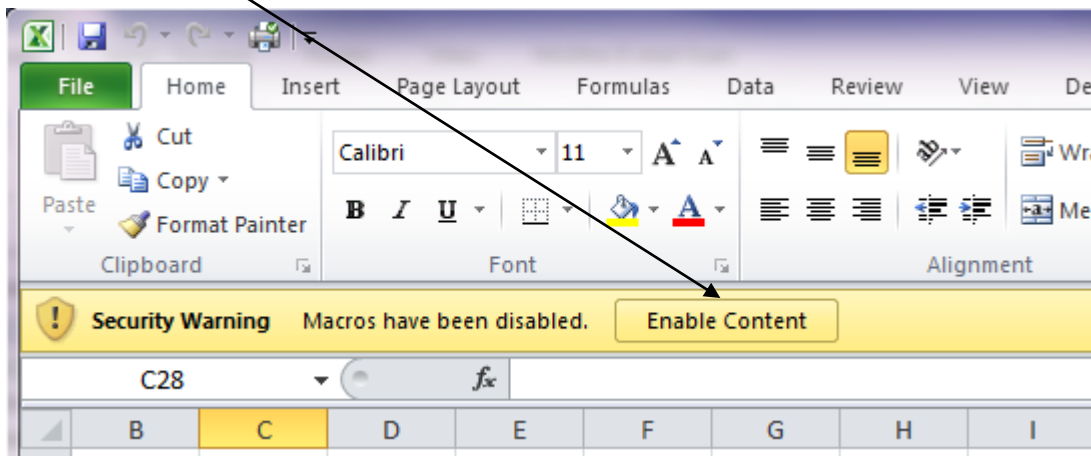   (Click the Enable Content button if Excel shows that warning)

Figure 20-1 Enable Content

2. **The Import CA ISIR File button in Cell A1**
   The Import CA ISIR File button will allow a user to locate and open a downloaded CA ISIR file.
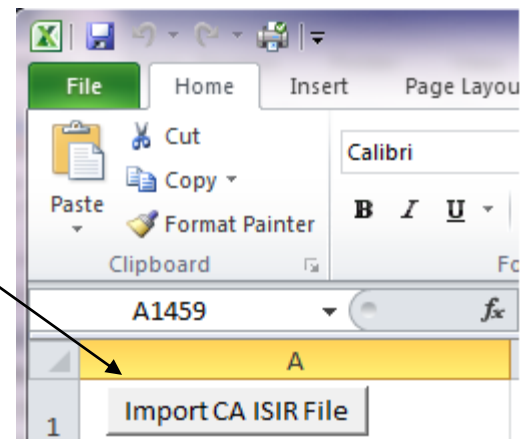
Figure 20-2 Import CA ISIR File

Page Functions

Open CA ISIR file using Microsoft Excel

1. Click the Import CA ISIR File button
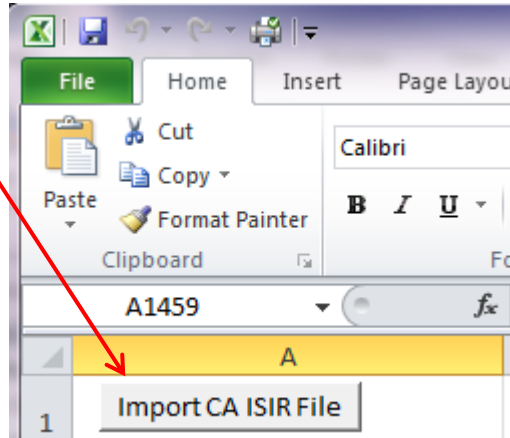
Figure 22-1 Import CA ISIR File

2. When the ImportFile button is clicked, the Tool will display Excel's Open File Dialog for you to navigate to the ISIR file you want to import. The Open File Dialog is shown here:
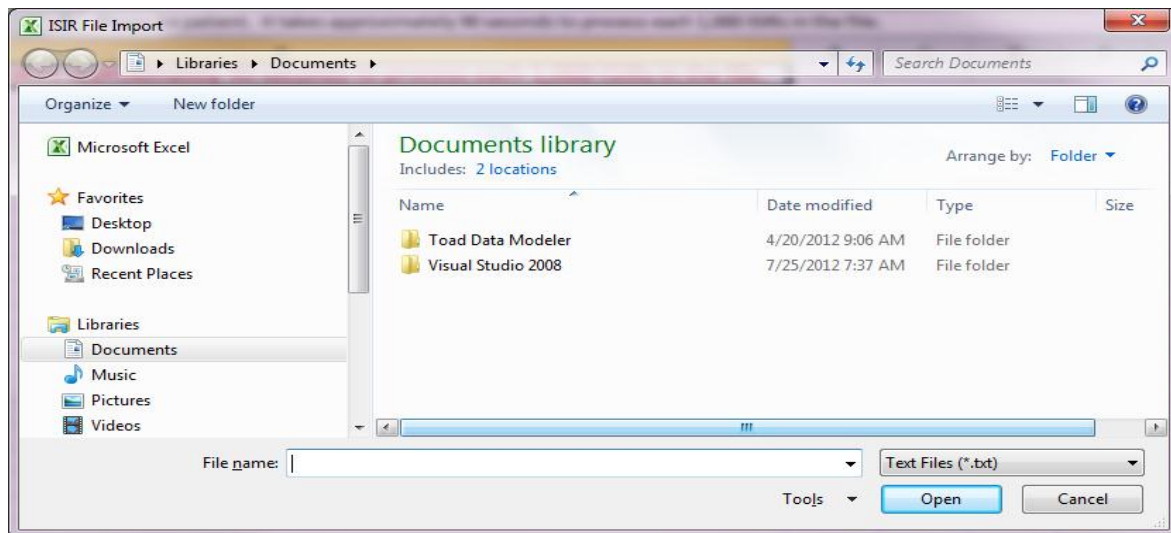

Figure 22-2 Excel's Open File Dialog

3. When you click the Open button on the Open File Dialog, the file will be processed. You will not see the Excel processing the file but you will regain Excel mouse/keyboard control with the processing is complete.

CA ISIR TOOL

4. To save the Excel workbook containing the imported ISIRs, do the following
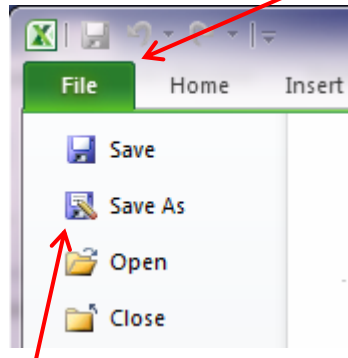   a. Click the File Tab as shown here:

Figure 22-3 Excel's File Tab

   b. Click the **Save As** on the File menu and you will see:
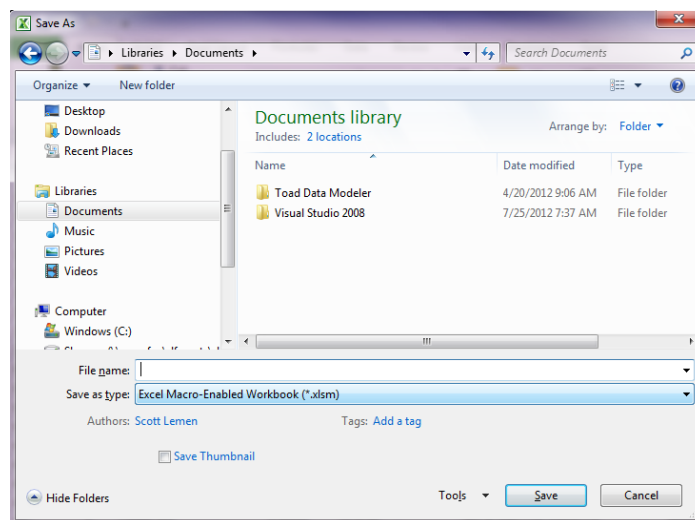

Figure 22-3 Excel's Save As

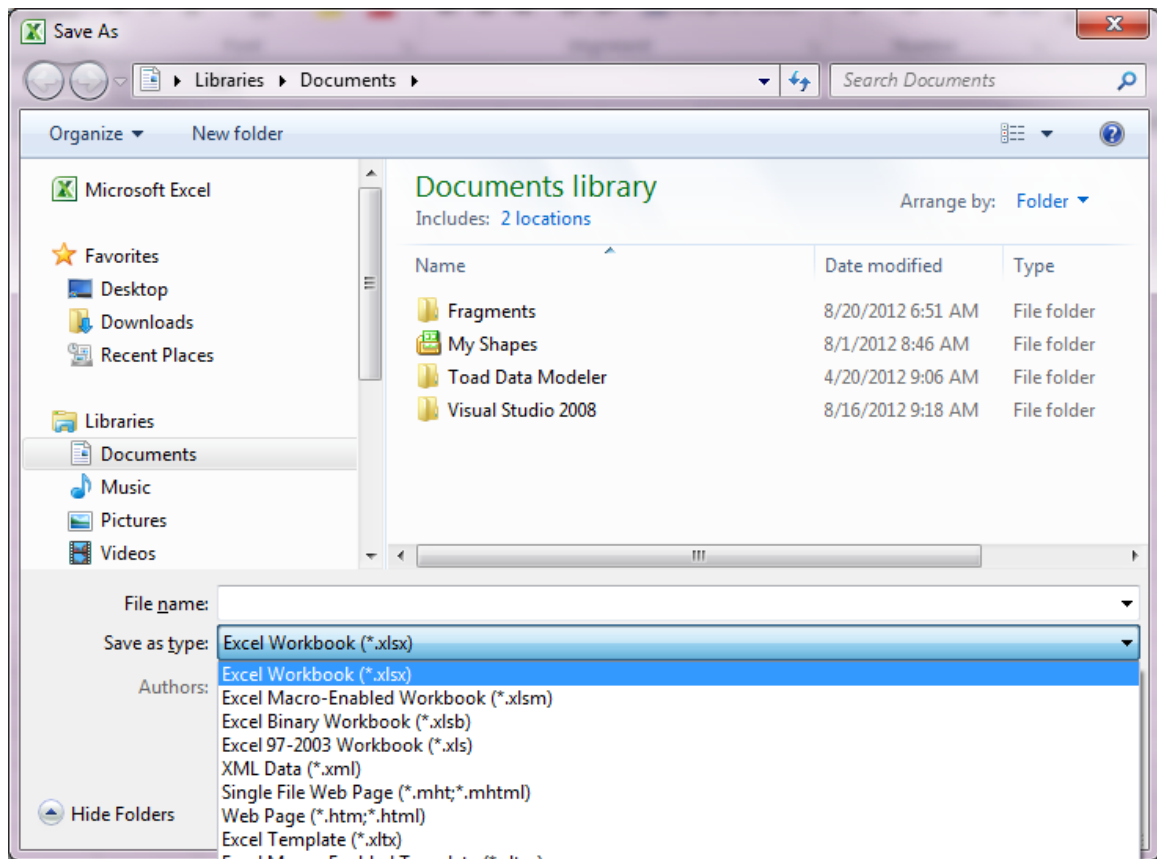c. Type in the file name and choose Excel Workbook (*.xlsx) as the Save as Type:

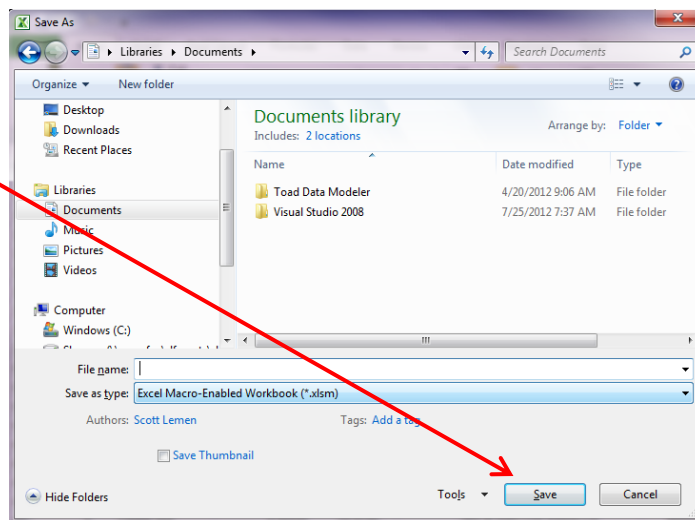*Figure 22-3 Excel's File Name and Save as type*

d. Click the Save button

Figure 22-4 Excel's Save button

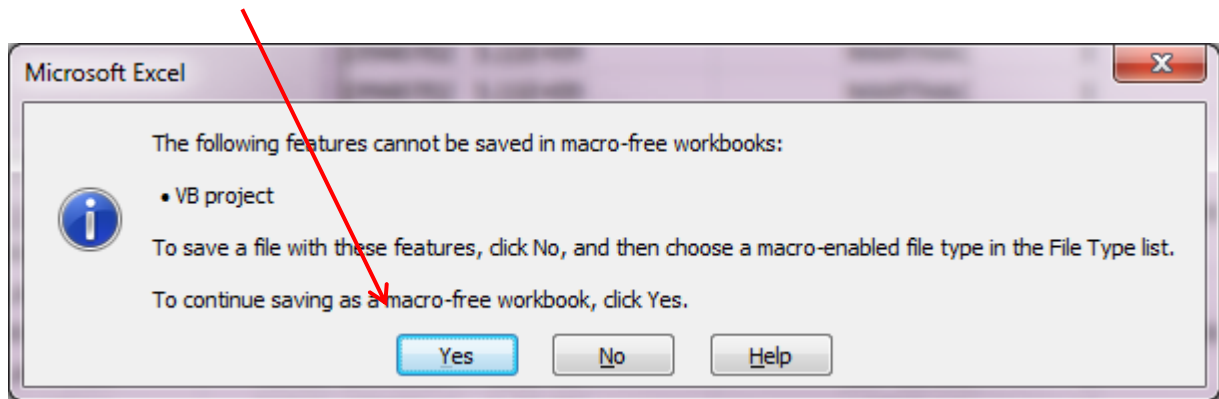# CA ISIR TOOL

e. Click the Yes button

Figure 22-5 Excel's Save as a Macro-free workbook

By clicking Yes, the Excel workbook will be saved without Macros or the code that processes the ISIR file. This will allow you to share the Excel ISIR file with others if your campus security prevents Macro-enabled workbooks from being shared.
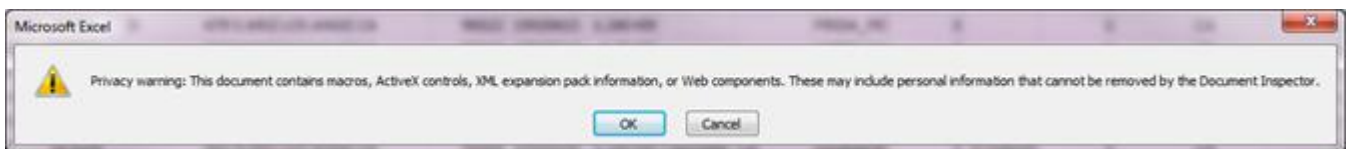
f. Click OK if you see this dialog.

Figure 22-6 Excel's Privacy warning